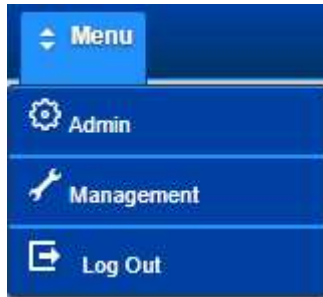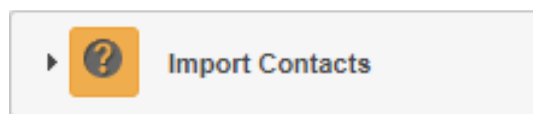# Management - Import Contacts

Select Management from the Main Menu

and then

There are 2 Steps to follow with the Import of Contacts

The Import of the Contacts in.CSV Format

The Mapping and Creation into the Cascades system

Download the CSV Template before you proceed

Imports must be done by Contact Category

There are 7 fields in the Import File – **4 of which are mandatory for data** ***

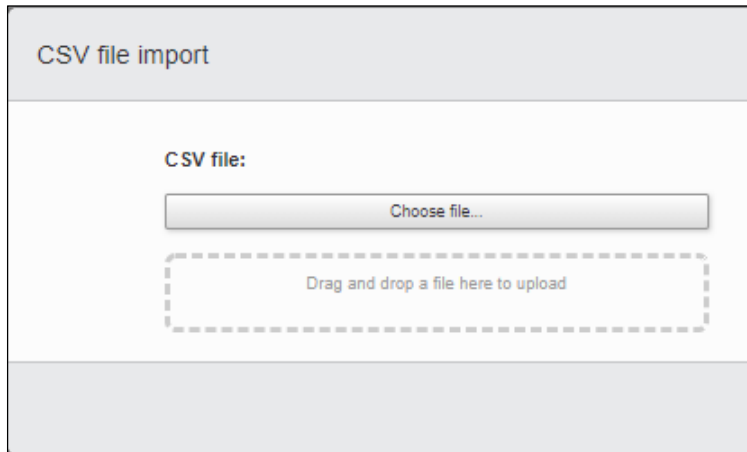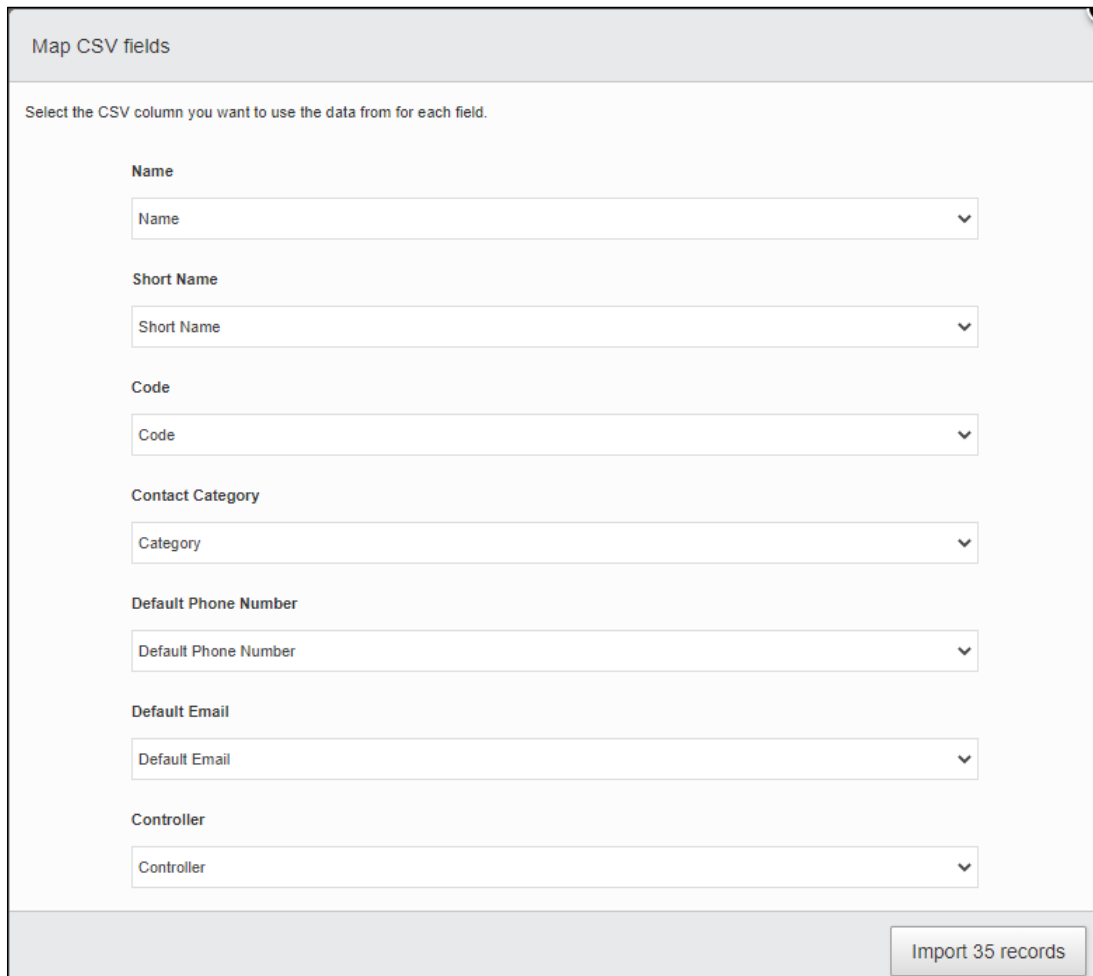|	
Name ***	the Registered Name of the Contact
Short Name ***	a Short Name for the Contact
Code	the Contact Reference Code or Account Number
Category Source ***	the System needs to classify your Contacts according to the Contact Categories created
	The default Categories, if you did not Add and/or Edit any categories are
	Customer
	Supplier
	Private
Default Phone Number	
Default Email	
Controller Source ***	this would be the Assignee primarily responsible for dealing with the Contact

Step 1 Import and Review

1. Select **Import CSV** and import your .CSV file

CSV file import

CSV file:

[Choose file...]

```
Drag and drop a file here to upload
```

The import allows for a maximum of 200 records at a time

2. Confirm that the fields map correctly and press the "Import" Button at the bottom of the Screen

Map CSV fields

Select the CSV column you want to use the data from for each field.

Name

| Name | ⌄ |

Short Name

| Short Name | ⌄ |

Code

| Code | ⌄ |

Contact Category

| Category | ⌄ |

Default Phone Number

| Default Phone Number | ⌄ |

Default Email

| Default Email | ⌄ |

Controller

| Controller | ⌄ |

[Import 35 records]

3. Confirm the field values – especially in respect of the Category and then press the "Submit" Button

Confirm import

Click the *Submit* button to confirm the import of 35 rows of data. Optionally, override the value for a field to set a common value by clicking on the field below.

Name

> Multiple values
> The selected items contain different values for this input. To edit and set all items for this input to the same value, click or tap here, otherwise they will retain their individual values.

Short Name

> Multiple values

Code

> Multiple values

Contact Category

> Beacon

Default Phone Number

Default Email

Controller

> Multiple values

Submit

4. Expand the record display option | Show 5 entries |
   Review the records to be imported

5. Press the | **Confirm All** | Button if you are satisfied with your Review

Now proceed with Step 2

Step 2 Map and Create

Map Category

1. Expand the record display option Show 5 ⌄ entries Tick all the Records

   and then activate the Map Category Button

   A quick way to tick (select) all Records
   Tick the 1st Record
   Scroll to the last record
   Hold down the "Shift" key and Tick the last record

   All records are now selected

2. The Category Source must be "Mapped to Category"

   Confirm the Categories and press Update

Map Controller

1. Expand the record display option Show 5 ⌄ entries Tick all the Records

   and then activate the Map Controller Button

2. The Controller Source must be "Mapped to Controller"

   Confirm the Controllers and press Update

Confirm All

Review all Mappings and activate the **Create All** Button

You can now proceed with the import of the next Contact Category